Overview & Methodology

This online report presents interim findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of Visit St. Pete/Clearwater. The data presented here comes from an in-person intercept survey of St. Pete/Clearwater area visitors at locations throughout the destination. To be considered a visitor respondents had to reside outside of Pinellas County. This online report presents the top-line survey data collected from October 2017 onward and collection is still ongoing.

<table>
<thead>
<tr>
<th>Month</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
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<tbody>
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<td>January</td>
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<td>May</td>
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<td>June</td>
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<td>July</td>
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<td>August</td>
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<td>September</td>
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<td>October</td>
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<td>November</td>
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<tr>
<td>December</td>
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<tr>
<td>Total</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>402</td>
</tr>
</tbody>
</table>

Data presented within this report is weighted to accurately reflect the overall population of St. Pete/Clearwater area visitors. The total number of completed surveys from Pinellas County visitors collected is detailed in the table to the right.
Overview & Methodology

Destination Analysts’ survey team worked at locations around the St. Pete/Clearwater area as well as at the Tampa International Airport to randomly select and interview visitors. The questionnaire was administered to persons residing outside Pinellas County at the following locations and events:

- Chihuly Collection
- Clearwater Beach
- Clearwater Marine Aquarium
- Dunedin
- Hyatt Place
- John’s Pass Village & Boardwalk
- Museum of Fine Arts
- Pier 60
- Salvador Dali Museum
- Sandpearl Resort
- Shephard’s Beach Resort
- St. Pete-Clearwater International Airport
- St. Pete Pier
- Sunken Gardens
- Tampa International Airport
- TradeWinds Island Grand
- The James Museum
- Wyndham Grand Clearwater Beach
Research Objectives

The overarching goal of this survey-based research is to create in-depth profiles of Pinellas County visitors, including:

• Detailed trip characteristics
  (i.e. the reason for visiting the area, length of stay, place of stay, etc.)

• Travel party composition

• Activities & attractions visited in the St. Pete/Clearwater area

• Evaluation of St. Pete/Clearwater brand attributes

• Detailed visitor spending estimates

• Travel planning resources used by St. Pete/Clearwater area visitors

• Visitor satisfaction

• Visitor demographics
KEY THINGS TO KNOW
Point of Origin

Country of Origin
- United States: 99%
- Canada: 1%
- United Kingdom: 0%
- Germany: 0%
- France: 0%
- Mexico: 0%
- China: 0%
- Other: 1%

State of Origin
- Florida: 38%
- New York: 8%
- Ohio: 7%
- Georgia: 5%
- Illinois: 4%
- Virginia: 3%
- Texas: 3%
- Indiana: 3%
- New Jersey: 3%
- Iowa: 2%
- Missouri: 2%
- North Carolina: 2%

MSA of Origin
- Tampa, FL: 19%
- Sarasota-Bradenton, FL: 6%
- Orlando, FL: 6%
- Washington, DC-MD-VA: 4%
- Atlanta, GA: 4%
- New York, NY-NJ: 3%
- Lakeland-Winter Haven, FL: 3%
- Cedar Rapids, IA: 2%
- Binghamton, NY: 2%
- Norfolk-Virginia Beach-Newport News, VA-NC: 2%
- Chicago, IL: 2%
- Cleveland, OH: 2%

Base: 2021 - August 402 responses.
### Lodging Type / Daily Spending in Market

#### Lodging Type
- Hotel, resort or motel in SPC: 18%
- Home share rental in the SPC: 4%
- Condo/vacation home in the SPC: 8%
- Private residence in SPC: 11%
- Day trip: 59%

#### Daily Spending
- Restaurants: $99
- Hotel/motel/inn/lodging: $82
- Retail store purchases: $66
- Other Entertainment & sightseeing: $51
- Gas, parking and local transportation: $11
- Car rental (in area only): $3
- Other: $5

Mean Travel Party Spending = $317
Avg # of People Covered by Spending = 3
Mean Spending Per Person = $114

Base: 2021 - August 402 responses.
Days & Nights in St. Pete/Clearwater

Days in Market

Mean Days
(≤ 30) = 3
(> 30) = 4

Nights in Market

Mean Nights
(≤ 30) = 2
(> 30) = 3

Base: 2021 - August 402 responses.
Primary Reason for Visit / Other Destinations Visited

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>40%</td>
</tr>
<tr>
<td>Visit friends or family in the area</td>
<td>24%</td>
</tr>
<tr>
<td>Other personal reasons</td>
<td>14%</td>
</tr>
<tr>
<td>Weekend getaway</td>
<td>12%</td>
</tr>
<tr>
<td>Attend special event, exhibition or concert</td>
<td>5%</td>
</tr>
<tr>
<td>Business</td>
<td>4%</td>
</tr>
<tr>
<td>Honeymoon</td>
<td>1%</td>
</tr>
<tr>
<td>Wedding</td>
<td>1%</td>
</tr>
<tr>
<td>Attend sports event/tournament</td>
<td>0%</td>
</tr>
<tr>
<td>Conference/tradeshow or other group meeting</td>
<td>0%</td>
</tr>
<tr>
<td>On or pre/post a cruise</td>
<td>0%</td>
</tr>
<tr>
<td>Government business/travel</td>
<td>0%</td>
</tr>
</tbody>
</table>

Other Destinations Visited on SPC Trip

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tampa</td>
<td>18%</td>
</tr>
<tr>
<td>Orlando/Disney</td>
<td>10%</td>
</tr>
<tr>
<td>Sarasota Area</td>
<td>7%</td>
</tr>
<tr>
<td>Crystal River</td>
<td>3%</td>
</tr>
<tr>
<td>Lakeland/Winter Haven</td>
<td>2%</td>
</tr>
<tr>
<td>Ft. Myers/SW Florida</td>
<td>2%</td>
</tr>
<tr>
<td>Panhandle</td>
<td>1%</td>
</tr>
<tr>
<td>Ocala/Gainesville</td>
<td>1%</td>
</tr>
<tr>
<td>Ft. Lauderdale/Palm Beach</td>
<td>1%</td>
</tr>
<tr>
<td>Jax/St. Augustine</td>
<td>1%</td>
</tr>
<tr>
<td>Kennedy/Space</td>
<td>0%</td>
</tr>
<tr>
<td>Florida Keys</td>
<td>0%</td>
</tr>
<tr>
<td>Miami</td>
<td>0%</td>
</tr>
<tr>
<td>Sebring</td>
<td>0%</td>
</tr>
<tr>
<td>Tallahassee</td>
<td>0%</td>
</tr>
<tr>
<td>Everglades</td>
<td>0%</td>
</tr>
<tr>
<td>Daytona</td>
<td>0%</td>
</tr>
<tr>
<td>NONE—The St. Petersburg</td>
<td>60%</td>
</tr>
</tbody>
</table>

Base: 2021 - August 402 responses.
Method of Arrival / Arrival Airport & Airline

Method of Arrival

- Personal vehicle: 61%
- Airline: 42%
- Rental vehicle: 10%
- Rideshare (Uber, Lyft, etc.): 2%
- Taxi or limo: 0%
- RV: 0%
- Tour bus: 0%
- Train: 0%
- Public bus: 0%
- Other: 1%

Method of Departure

- Personal vehicle: 59%
- Airline: 28%
- Rental vehicle: 10%
- Rideshare (Uber, Lyft, etc.): 3%
- Public bus: 0%
- RV: 0%
- Tour bus: 0%
- Train: 0%
- Taxi or limo: 0%
- Other: 1%

Base: 2021 - August 402 responses.
### Method of Arrival / Arrival Airport & Airline

#### Airport of Arrival
- Tampa Int'l.: 52%
- St. Pete-Clearwater Int'l: 28%
- Orlando Int'l: 19%
- Sarasota/Bradenton Int'l: 0%
- Ft. Lauderdale Int'l: 0%
- Sanford Int'l: 0%
- SW Fl Int'l. (Ft. Myers): 0%
- Miami Int'l: 0%
- Palm Beach Int'l: 0%
- Jacksonville Int'l: 0%
- Other: 0%

#### Airline Used by Airport of Arrival
- **Tampa Int'l.**
  - Allegiant: 1.2%
  - American Airlines: 32.0%
  - Southwest: 30.8%
  - Delta Airlines: 10.1%
  - United: 10.1%
  - Jet Blue: 4.2%
  - Sun Country: 0.0%
  - Alaska Airlines: 0.0%
  - Other: 11.5%

- **St. Pete-Clearwater Int'l**
  - Allegiant: 97.0%
  - American Airlines: 0.0%
  - Southwest: 0.0%
  - Delta Airlines: 1.1%
  - United: 0.0%
  - Jet Blue: 0.0%
  - Sun Country: 0.0%
  - Alaska Airlines: 0.0%
  - Other: 1.9%

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*Base: 2021 - August 402 responses.*
Rental Vehicle Pick-Up City / Transportation Used In-Market

Rental Vehicle Pick-Up City
- Tampa: 47%
- Orlando: 32%
- St. Petersburg/ Clearwater area: 18%
- Sarasota/Bradenton: 1%
- Ft. Myers: 1%
- Fort Lauderdale: 1%
- Sanford: 1%
- Outside of Florida: 0%
- West Palm Beach: 0%
- Miami: 0%
- Jacksonville: 0%

Transportation Used In-Market
- Personal vehicle: 72%
- Rental vehicle: 22%
- Uber, Lyft, etc.: 6%
- Free Beach Rides: 2%
- Taxi or limo: 1%
- Public bus: 1%
- Motorcycle: 0%
- Boat: 0%
- Bicycle: 0%
- Tour bus: 0%
- RV: 0%

Base: 2021 - August 402 responses.
Travel Party Composition / Travel Party Size

**Travel Party Composition**

- Solo: 13%
- Couple: 31%
- Immediate Family: 39%
- Extended Family: 4%
- Group of Couples: 4%
- Group of Friends: 11%
- Tour Group: 0%
- Business Associates: 0%
- Other: 1%

**Travel Party Size**

- Female adults (18 yrs. +): 1
- Male adults (18 yrs. +): 1
- Female children (0 to 17 yrs.): 0.2
- Male children (0 to 17 yrs.): 0

**Avg Travel Party Size = 3**

Percent with Children = 30%

Base: 2021 - August 402 responses.
### Important Factors to Destination Decision / Trip Activities

**Important to Decision to Visit**

- Beaches that suit my tastes: 40%
- Friends or family in the area: 30%
- Overall ambiance & atmosphere: 14%
- A specific attraction: 14%
- Scenic beauty: 13%
- Restaurants, cuisine, food scene: 12%
- Shopping opportunities: 11%
- Recommendation from people I trust: 11%
- Advertisements for the area: 7%
- Attractions in the area: 6%
- Arts & cultural offerings: 6%
- Easy to get to: 6%
- Appealing hotels/resorts: 5%
- Weather: 5%
- Fishing opportunities: 4%

**Trip Activities**

- Dining in restaurants: 88%
- Visit the beach: 74%
- Shopping: 68%
- Swimming: 51%
- Visit friends or family: 24%
- Other boating: 18%
- Guided tour: 17%
- Bars/Nightlife: 14%
- Photography: 12%
- Visit museums: 12%
- Fishing: 6%
- Visit breweries and/or distilleries: 5%
- Jet skiing: 4%
- Shelling: 4%
- Bird watching: 4%

Base: 2021 - August 402 responses.
First-Time Visit to Florida / Previous Visitation to St. Pete/Clearwater

First Time Visitors to Florida

- Yes: 7%
- No: 93%

Previous Visitation to the St. Pete/Clearwater Area

- First Time Visitor: 37%
- 1 - 10 Previous Visits: 36%
- 11 - 20 Previous Visits: 8%
- More than 20 Visits: 20%

Mean # of Past Trips = 9

Base: 2021 - August 402 responses.
### Attractions Visited

<table>
<thead>
<tr>
<th>Attraction</th>
<th>Visited Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Pete Pier</td>
<td>12%</td>
</tr>
<tr>
<td>Clearwater Marine Aquarium</td>
<td>11%</td>
</tr>
<tr>
<td>Orlando area Theme Parks</td>
<td>9%</td>
</tr>
<tr>
<td>Sunken Gardens</td>
<td>6%</td>
</tr>
<tr>
<td>Chihuly Exhibit</td>
<td>6%</td>
</tr>
<tr>
<td>Dali Art Museum</td>
<td>6%</td>
</tr>
<tr>
<td>Tarpon Springs</td>
<td>3%</td>
</tr>
<tr>
<td>Busch Gardens</td>
<td>3%</td>
</tr>
<tr>
<td>Ft. Desoto Park</td>
<td>2%</td>
</tr>
<tr>
<td>Caladesi Island</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>NONE OF THESE</td>
<td>59%</td>
</tr>
</tbody>
</table>

### Communities Visited

<table>
<thead>
<tr>
<th>Community</th>
<th>Visited Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clearwater Beach</td>
<td>52%</td>
</tr>
<tr>
<td>Madeira Beach</td>
<td>36%</td>
</tr>
<tr>
<td>St. Petersburg</td>
<td>24%</td>
</tr>
<tr>
<td>St. Pete Beach</td>
<td>21%</td>
</tr>
<tr>
<td>Clearwater</td>
<td>14%</td>
</tr>
<tr>
<td>Treasure Island</td>
<td>10%</td>
</tr>
<tr>
<td>Indian Shores &amp; Indian Rocks Beach</td>
<td>8%</td>
</tr>
<tr>
<td>Dunedin</td>
<td>5%</td>
</tr>
<tr>
<td>Tarpon Springs</td>
<td>4%</td>
</tr>
<tr>
<td>Largo</td>
<td>4%</td>
</tr>
<tr>
<td>Pass-A-Grille Beach</td>
<td>3%</td>
</tr>
<tr>
<td>North Redington Beach/Redington...</td>
<td>2%</td>
</tr>
<tr>
<td>Tierra Verde</td>
<td>2%</td>
</tr>
<tr>
<td>Palm Harbor</td>
<td>1%</td>
</tr>
<tr>
<td>Seminole</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Base:** 2021 - August 402 responses.
Most Liked Aspects of SPC (Unaided) Feelings in SPC Area (Unaided)

- **Beaches / Ocean**: 56%
- **Scenic Beauty**: 24%
- **Everything**: 16%
- **Friendly People**: 14%
- **Relaxing Atmosphere / Ambiance**: 14%
- **Food / Restaurants & Bars**: 14%
- **Entertainment / Variety of Fun**: 14%
- **Tropical Climate / Warm Weather**: 11%
- **Shopping**: 10%
- **Atmosphere**: 9%
- **Clean**: 7%
- **Accessible / Convenient / Walkable**: 6%
- **Great Location / Easy to get to**: 4%
- **Safe**: 3%
- **Family Friendly**: 2%
- **Great Location / Easy to get to**: 2%
- **Calm / Relaxed**: 39%
- **Happy**: 36%
- **Amazing**: 11%
- **Fine / Good**: 5%
- **Energized / Excited**: 5%
- **Refreshed / Healthy**: 4%
- **Comfortable**: 2%
- **Entertained**: 2%
- **Welcomed**: 2%
- **Safe**: 1%

**Base:** 2021 - August 402 responses.
Attractions or Services that Would Enhance the Destination Experience

Additional Attractions or Services (Unaided)

- It needs no improvement: 68%
- Cheaper & More Parking: 14%
- Less congestion / traffic: 5%
- More shaded / green areas: 3%
- More Affordable: 3%
- More public restrooms: 2%
- Clean it up: 2%
- Better Signage /accessibility: 1%
- More Activities / Attractions: 1%
- More Public Transportation Options: 1%
- Restaurant Diversity: 0%
- Tourist Information: 0%
- More kid friendly activities: 0%
- Bars and food options on the beach: 0%
- Better Nightlife: 0%

Base: 2021 - August 402 responses.
When Decision to Visit was Made / Travel Planning Resources Used

Average Time Between Decision to Visit and Arrival

Resources Used before Arrival and While In Market

- User-generated content/Review websites, such as Yelp and…
- Opinions of friends or relatives
- Online travel agencies (Expedia, Travelocity, etc.)
- Travel guides, brochures
- Social Media content
- Official St. Petersburg/Clearwater area tourism website,…
- YouTube or other online videos
- Television programming
- Lifestyle or travel magazines
- Travel agency (traditional, offline)
- Newspaper travel section
- Radio programming
- Gulf to Bay St. Pete/Clearwater Destination Magazine

BEFORE ARRIVING
WHILE IN ST. PETE/CLEARWATER AREA

47 Days in Advance

Base: 2021 - August 402 responses.
Experience Satisfaction / Earned & Paid Media Recall

**Overall Satisfaction**

Very satisfied: 90%
Satisfied: 10%
Neutral—neither satisfied nor unsatisfied: 0%
Unsatisfied: 0%
Very unsatisfied: 0%

**Media Recall**

- Yes: 62%
- No: 31%
- Maybe/Not sure: 7%

Base: 2021 - August 402 responses.
Likelihood to Recommend / Likelihood to Return

Likelihood to Recommend

9.7 / 10

Likelihood to Return

9.5 / 10

Base: 2021 - August 402 responses.
Demographics

- **Gender**: Female 67%, Male 33%, Other 0%, I prefer not to answer 0%

- **Ethnicity**: Caucasian 83%, Black/African-American 9%, Latino/Hispanic 5%, Asian/Pacific Islander 2%, American Indian/Alaska Native 0%, Other 1%, I prefer not to answer 0%

- **Marital Status**: Single 27%, Single with children under 18 4%, Married/partnered 42%, Married/partnered with children under 18 22%, Other 4%, I prefer not to answer 1%

- **Orientation**: Heterosexual 96%, LGBTQ 2%, Other 0%, I prefer not to answer 0%

Base: 2021 - August 402 responses.

Average Age: 49.2

Average Income: $95,030
Visit St. Pete Clearwater
Visitor Profile Study
Infographic Profile: 2021 - August 402 responses.
Infographic Profile: 2021 - August 402 responses.

- **13.8%** Millennials
- **44.6%** Gen X
- **23.1%** Baby Boomers

**Domestic vs. International**

- **99%** United States Resident
- **1%** International Visitor

**Point of Origin: Top States**

- **Florida**: 38%
- **New York**: 8%
- **Ohio**: 7%

**Factors Important to Destination Decision**

- **40%** Beaches that suit my tastes
- **30%** Friends or family in the area
- **14%** Overall ambiance & atmosphere
- **14%** A specific attraction: Scenic beauty
- **13%** Restaurants, cuisine, food scene
Infographic Profile: 2021 - August 402 responses.

Length of Stay
3.1 Days (on average)

Seasonality of Visit
- Jan-Mar: 0%
- Apr-Jun: 0%
- Jul-Sept: 100%
- Oct-Dec: 0%

Travel Party Size
- 2.9 People
- 29.6% Traveled with Children

Daily Spending
- $114.30 Per Person

Top Communities Visited
- Clearwater Beach: 52%
- Madeira Beach: 43%
- St. Pete Beach: 32%
- St. Petersburg: 28%
- Treasure Island: 20%

Top Activities
- Dining in restaurants: 88%
- Visit the beach: 74%
- Shopping: 68%
- Swimming: 51%